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ABSTRACT

A training project for regional accreditation evaluation teams of the Western Association of Schools and Colleges (WASC) was evaluated. The project was designed to train WASC team members to understand and use effectively newly-developed standards and to function effectively in team visits. Training procedures were as follows: a workshop for chairpersons, on-site orientation run by chairpersons and other staff, and a follow-up workshop for chairpersons. The role and activities of the project evaluator are outlined, and inferred goals of the training procedures are addressed. Followup questionnaires were administered to the following groups: chairpersons after the initial workshop, each chairperson after the team visit, each team member after the team visit, and each institution after the team visit. Additionally, two chairpersons were observed during on-site training, and training formats of other regional agencies were assessed. A workshop for potential evaluators for nontraditional institutions was also conducted. Changes that will be implemented as a result of the project are outlined. Sample questionnaires and evaluation form and workshop schedules are appended. (SW)

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An Effort To Improve The Performance
of Regional Accreditation
Evaluation Teams

H. R. Kells

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The evaluation of a training project
conducted by the Senior Commission of
The Western Association of Schools
and Colleges, Oakland, Calif.
1979-80

November, 1980

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Copies of this report are available from the offices of the WASC, Senior Commission, c/o Mills College, Box 9990, Oakland, California 94613

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Background

The performance of the evaluation team in the regional accreditation process is of critical importance as one of the three major steps in the process -- the self study, the team visit and report, and the action by the accrediting commission. The evaluation team effort is a difficult one to perform well. The team comes at a time of considerable anxiety on most campuses (1), and it attempts to perform what some feel are two contradictory functions. First, the attempt is made to evaluate the institution using the report produced as a result of the self-study process, seeking answers to these questions: Are the goals of the institution clear? Are they being achieved in large part? Is the institution functioning well? What are its problems? Are they being analysed and solved? Are the human, fiscal and physical resources generally adequate? and finally, are the standards of the accrediting agency being met at a generally acceptable level? They also attempt a second major thrust -- at least in most regions. They seek to assist the institution by sharing expertise. Making all of this happen demands on the part of the visitors subject matter expertise, sensitivity, teamwork, and skills as a group, all marshalled by a chairperson of maturity and experience and with skills as a group leader.

It is therefore surprising to find that the subject of evaluation team selection, training and performance has received relatively little studied attention from accrediting agencies and is almost unaddressed in the published or in the less formal literature. This is not to imply that accrediting agencies do not compose evaluation teams carefully or that they do not conduct some training activities. However, there is little evidence that they have seriously studied the performance of their teams -- as functioning teams and as evaluators. The post-visit letters of reactions to the experience from institutions requested by some agencies hardly satisfies this need. The evaluation team training function is manifest in some, usually one-day, training sessions which most but not all evaluators or chairpersons attend. Recent inquiries by the writer indicate that the primary modes of instruction in these sessions is lecture or panel presentations, the answering of questions and discussion groups. Some agencies use a work group activity or two, and some use sample materials for critique. Rarely are simulation, role-playing, or "hands-on," learn-by-doing techniques employed. Most agencies have a written manual of some kind for evaluators and chairpersons to read. Some of the agencies have made special efforts at times to increase the intensity, breadth and effectiveness of evaluator training, but these are not consistent

characteristics of the system. (2)

There have been a few efforts to study some aspects of the evaluation team activity in accreditation. Other than Harcleroad's essay calling for a highly trained cadre of educational auditors to replace volunteer evaluation teams (3) there have not been thorough studies or proposals made. Warner, in his study of the impact of and reaction to the regional accreditation process as a whole in two of the accreditation regions, approached the subject in a very general way. Most of the reactions he received were made concerning the entire process, not the team or its visit in particular (4,5). Kells studied the evolution of team characteristics in one region during the 1970's, reporting among other things on the trends with respect to size of teams, their congruence with characteristics of the institution they visited, and the age and previous experience of members and chairpersons (6). Kells and Kirkwood gathered some reactions by institutions to the team visit in regional accreditation in the 1970's, particularly as it related to the nature of the self-study process (7). Finally, Baysore, in 1970, studied the extent to which a sample of 10 specialized and one regional accrediting agency seemed to prepare well their evaluators for the task (8). Baysore's study was the only one known to this writer which directly addressed the training or preparation

dimension. He found that only four of the seven agencies had formal training programs the thrust of which seemed to be the improvement of the capacity of carefully (though informally) selected, qualified (subject matter and job experience) team members to make judgments about institutions and programs. So it seems that there was no evidence a decade ago that accrediting agencies extensively used formal training programs for evaluators which were designed to increase team skills through enhanced knowledge and practice. The training was and apparently largely still is (this requires verification through systematic current study) informal, "conducted" through printed materials and on-site, on-the-job, guided or unguided experiences.

The WASC Project

During the last part of the 1970's, the Senior Commission of the Western Association of Schools and Colleges (WASC) reviewed, reformulated and greatly strengthened their standards for accreditation of senior colleges in the region. (9). In the process the standards were made more explicit and more detailed and a lengthy, participatory process was conducted which provided a fairly strong consensus about their worthiness for use in the region. Near the end of the process, the Executive Director sought and received funds from the W. K. Kellogg Foundation and the Hewlett Foundation to conduct

during 1979-81/ an effort to train WASC team members to understand and use effectively the new standards and to function well in team visits during the year. This writer was engaged in September, 1979 to evaluate the training project.

The Context for the Training -- The WASC Senior Commission employs a particular type of training procedure for evaluation team members. It relies heavily on written materials and on the chairperson of the team. It has three steps.

1. The chairperson and the team members are expected to read a section in the Commission's Handbook (9) entitled "Guidelines for an Evaluation Visit."
2. The chairperson is invited to a residential one-day (conducted over a two day period) training session. The September, 1979 version had presentations, panels, opportunities for discussion and it used a "model" report and some "checklists" for chairpersons. This session represented a major aspect of the WASC grant activities in 1979-80 (see below).
3. The chairperson is expected to orient and to "train" the team members at the site of the evaluation visit in a four hour session set aside on the afternoon of what the staff called "the day prior to the visit."

Other regional agencies use different schemes for training.

They vary greatly in extent and mode. A common, somewhat contrasting scheme includes:

1. Small handbook for team members and one for chairpersons;
2. Attendance by all first-time team members at a one-day training session (instructional mode varies.. from "talking at" to films and simulations); and
3. Attendance of all chairpersons at a one-day training session every one to three years. (The frequency varies according to staff role regarding the visit. Those having staff members at the visit site sometimes use a longer training cycle)

The Goals For The Project -- The grant request to the foundations which provided the financial support was prepared in mid-1979 by the WASC Senior Commission staff. The general intention for the project, of course, was to prepare the WASC teams to function well with the new WASC accreditation standards and thereby to influence the direction of regional accreditation activities. More specific goals were not stated. The procedures proposed were as follows:

1. To conduct a workshop for chairpersons
2. To acquaint all team members with the new standards via the aforementioned workshop, and--

3. to employ on-site orientation sessions to be run by the chairpersons with a staff member or regular commission consultant assisting,
4. to conduct a follow-up workshop for the chairpersons after the 1979-80 activities to share experiences and to receive evaluation data from--
5. a project evaluator.

The Role of the Evaluator -- Because the evaluator joined the project after the goals and procedures for the project and the procedures for the vital first workshop were established, there was no chance to provide formative evaluation of these aspects of the process. A style of formative or on-going as opposed to solely summative, evaluation was adopted, however, for the rest of the project since the staff was interested in feedback as the 1979-80 activities progressed. Furthermore, a "self-study" style which included improvement-oriented dialog on an on-going basis seemed most appropriate for work with an accrediting agency.

Procedures -- the project evaluator took the following steps during the course of the year:

1. all project documents including the schedule for the September 1979 chairperson workshop were reviewed in detail;

2. the staff were interviewed just prior to the chairperson workshop;
3. a set of specific goals for the training were inferred from the documents, the workshop schedule and activities, and the interviews;
4. follow-up questionnaires were formulated based in part on the inferred goals for use with
 - a. chairpersons after their Sept. 1979 workshop;
 - b. each chairperson after the team visit;
 - c. each team member after the team visit;
 - d. each visited institution after the team visit;
5. two chairpersons were observed on-site as they oriented/trained their teams;
6. other regional agencies were contacted concerning present training formats;
7. data from the foregoing steps were analysed and presented at the October 1980 chairpersons follow-up workshop during which the year was reviewed and suggestions were made to improve training, the standards and their use.

Inferred, Specific Goals for Chairperson Training --
the analysis of the grant proposal documents and schedule of

activities at the chairperson workshop indicated to this writer that the specific goals, although unstated, must have been as follows:

1. to convince the chairpersons that training is needed;
2. to have the chairpersons achieve a working understanding of the new standards;
3. to assist the chairpersons to feel comfortable about applying the standards at traditional and non-traditional institutions;
4. to enable chairpersons to use the standards effectively -- as perceived by the chairperson, the team members and by the visited institutions;
5. to assist the chairpersons to be able to orient well the team members on-site regarding the standards and the visit per se;
6. to prepare chairpersons to evaluate the use of the standards, the WASC handbook and the training effort; and
7. to enhance the likelihood that useful team reports would result from the team visits.

In addition, it seemed that the inferred goals for the on-site orientation effort conducted by the chairpersons seemed to be:

1. to prepare team members to use the standards at the

institution in question; and

2. to prepare team members (particularly first-time team members) to function well as team members and as evaluators.

First Elements of the Formative Evaluation

This writer's first reactions to the goals formulated and presented above were that in order to achieve the goals at any reasonable level, two kinds of training activities would be required--information giving activities (perhaps lectures, handouts, discussions, films, handbook materials and the like) about ways to use the standards and the institution's self-study report, how to conduct a visit, how to orient team members, and how to organize and prepare a report; and practice activities, that is, learning-by-doing through using the standards with respect to case settings, through design exercises regarding the visit or preparing the report, through simulations and role playing regarding certain aspects of the visit (orientation, evening meetings, final report session) or with respect to group skills such as reaching consensus, problem identification and clarification, finding and using resources in the group and the like).

The review of the activities of the first major residential, chairperson training session in the project held in September, 1979 at the Kellogg West Conference Center in

Pomona, California (see Appendix A) as well as review of the audio tapes of the sessions and interviews with the staff members who planned and conducted the workshop led very rapidly to the conclusion that the workshop focused almost exclusively on the information giving and personal sharing type of activities to the almost total exclusion of the practice or learning-by-doing activities. There also seemed to be some scheduling, group leadership and arrangements problems which were discussed with the staff.

Evaluation of the Workshop By Chairpersons -- The chairpersons in attendance at the September, 1979 workshop were asked to complete a post-workshop questionnaire (Appendix B). Thirty-four (34) of the forty (40) chairpersons in attendance completed the instrument. The results can be summarized as follows:

1. There was (and still appears to be) a considerable need for training activities. Fully fifty (50) percent of the attendees had experienced no previous chairperson workshops anywhere.
2. The September, 1979 workshop was viewed by the participants as a general success. The vast majority found the sessions to be "useful" or "very useful." The greatest strengths of the effort were seen as

(a) the opportunity for sharing information and perceptions with other chairpersons; (b) the review of some techniques which could be used in team visits; and (c) achieving a greater understanding of the standards.

3. The participants felt that such workshops can be improved. They found the least useful aspects to be (a) the instructional modes employed; (b) the session which dealt with preparation of the team report; (c) the session which dealt with the chairperson's role in on-site orientation of team members; and (d) the focus (or lack of it) on the evaluation of non-traditional institutions.
4. The chairpersons made suggestions for improving the training sessions. They were:

- a. include doing things: role playing; examining cases and the like
- b. focus more on ways to orient the team and techniques for other on-site work
- c. make better use of small discussion or task groups
- d. improve workroom setting and acoustics

Observations of On-Site Team Member Orientation

This evaluator observed, in February 1980, two team

chairpersons as they conducted the recommended on-site team member orientation sessions on the first afternoon of evaluation team visits in the WASC region. Two very effective aspects and two not so effective aspects were observed.

The very effective aspects were--

1. The chairperson skill at "forming" the team as a functioning unit through "getting to know" activities (warm, open introductions, eating together, promoting easy conversation on topics of common interest) and thorough, friendly, useful discussion of the roles to be played by the team and individual members
2. The method of orienting the team to the use of the standards by relating them directly and quite thoroughly to the institution to be evaluated via analysis of the self-study report.

The weakest aspects were--

1. New (first-time) evaluators seemed somewhat lost and even "put off" a bit. They lacked the base of common evaluation team experience shared by the other team members.
2. Some attempts to focus on the standards per se ("let's walk through the standards together") conducted by staff members or an assigned consultant

seemed to be far less than acceptable to the team members. These attempts did not seem to be effective and they took up valuable time.

The Post-Visit Questionnaires

As indicated earlier, three questionnaires were used in an attempt to assess the effectiveness of the training effort as perceived by team visit participants after the visit -- chairpersons, team members and the institutions visited (via the accreditation liaison officer).

The decision was made to employ these questionnaires (see Appendices C, D, & E) only with the participants who experienced full, regular initial or reaffirmation accreditation team visits, setting aside the opportunity to examine "interim," "progress" or other less than full term reviews which followed a period of self-study. The sample therefore was twenty-five (25) visits including five (5) for initial accreditation and twenty (20) for reaffirmation of accreditation. They involved a total of 244 chairpersons (25) and team members (219). Seven of the twenty-five visits were held in the Fall of 1979 and eighteen were held in the Spring of 1980. The institutions visited are described below:

<u>Size:</u>	<u>Sponsorship</u>
1-1000 students.....13	private.....19
1001-5000..... 7	public..... 6
5001-15000..... 2	
greater than 15000..... 3	<u>Highest Degree Offered</u>
	baccalaureate.....3
<u>Curric./Instructional Style*</u>	master/profl.....9
"traditional".....12	doctorate.....13
"non-traditional"..... 5	
A mixture of the two.... 8	

So, the sample was predominantly small, privately sponsored institutions, and it was skewed toward graduate education (as highest offering) and was comprised of institutions viewed as offering both traditional and non-traditional fare. This institutional mix is not necessarily characteristic of the region and this was considered as the responses were analysed.

The teams which visited the twenty-five institutions ranged in size: nine had 1-5 members; seven had 6-10 members; four had 11-15 members; and five had more than 15 members.

The overall respondent population of team members had a good mixture of previous team experience (one-third had no previous team experience -- a surprisingly high and very significant figure; one-third had 1-3 previous team experiences;

*As perceived by chairperson of team.

and one-third had more than 3 previous visits) and an amply representative mixture of primary roles at their home institutions -- 38% were faculty members; 61% were administrators, and less than 1% were lay persons.

Chairperson Responses -- Eighty percent of the chairpersons in the sample responded to the questionnaire (Appendix C). It essentially asked them to reflect, after the visit was experienced, on the training that they had received and on the team visit itself. In summary the responses indicated --

1. That their responses made previously about the weaknesses of the training workshop were sustained through/by the team visit experience (modes; report writing; ways to orient the team). That the workshop had been generally useful, however.
2. That one-third of the chairpersons reported some problem in applying the new accreditation standards -- specifically, the standards concerning governance and academic programs seemed to provide the most problems. They reported that the standards were difficult to apply at larger, multi-school institutions (noting a kind of matrix, task-assignment problem).
3. Fully 25 percent of the chairpersons reported that

their attempt to orient the team members on-site could only be rated "fair" or "poor" in effectiveness.

4. Over two-thirds reported that more "hands on" training experiences were "perhaps" or surely necessary. They felt more practice was needed.
5. While quite a few isolated suggestions were made, the primary ones were:
 - (a) more practice in training efforts.
 - (b) conduct training for all new chairpersons and periodic refresher efforts.
 - (c) conduct separate training sessions for first-time team members.
 - (d) assist chairpersons to orient team members and to design visits to large, complex units (the matrix/assignment issue).

The Team Member Responses -- Seventy-four percent of the 219 team members responded to the post-visit questionnaires (See Appendix D). The range of response per team was from 50 to 100%. The data were compiled and the major responses were analysed in light of the institutional and team member characteristics in the sample.

Three major questions were asked of the respondents concerning the training and use of the new standards. The first

had to do with the usefulness of the on-site orientation provided by the team chairperson. The respondents indicated as follows:

Very useful.....	26%
Useful.....	51%
Not so useful.....	18%
Not useful at all.....	5%

The 23% of the respondents who indicated negative reactions seemed to have some correlation with those visiting large, public institutions; with reaffirmation visits; with faculty status and Spring team members. Most of the negative reactions were clustered on 20% of the teams and seemed to relate fairly highly to those where little or no orientation was conducted or to those chairpersons using lengthy reviews of the standards per se (unrelated to the institution) in the orientation.

The respondents were asked if it was difficult to use the new standards. Their responses--

Yes, very.....	2.5%
Yes, somewhat.....	26%
No.....	72%

Again, the highest correlations with the 28.5% indicating some difficulty seemed to be with visits to public institutions, with membership on Spring teams, with faculty persons and experienced visitors. There was also a bunching of negative responses on some of the particular teams which experienced some of the previously mentioned orientation processes.

The respondents were asked if difficulty was encountered using the standards in report writing. The responses--

Yes, very.....	3.7%
Yes, somewhat.....	23%
No.....	73.5%

Again about 27% of the respondents experienced difficulty. These responses had highest correlation with team visits to public institutions, to institutions where the highest degree offered was the masters or first professional degree, and with medium sized institutions and teams.

So, in summary, negative reactions to on-site orientation and difficulty in use of the standards centered about four recurrent themes.

1. Team members on Spring teams seemed to have disproportionately more negative reactions. This could be related to the time which elapsed between the chairperson workshop and the on-site orientation and seems to reinforce the need for a team members' handbook and perhaps separate team member training.
2. The visits to public, medium-to-large size institutions also yielded more negative reactions. This seems to be related to the complexity of these institutions (the aforementioned matrix/task assignment problem) and may relate to a greater concern in the standards for private institutions.

3. There did seem to be some team-specific problems which seemed to relate to the approach used to orient the team.
4. The faculty members did seem to be disproportionately negative in their reactions. This writer finds this quite understandable since the team visits are in large measure administrative tasks.

It was possible to compile the incidence of team member problems with specific accrediting standards. The standards are identified as follows:

- I. Purpose
- II. Governance
- III. Educational Program
- IV. Faculty and Staff
- V. Library
- VI. Student Services
- VII. Physical and Other Resources
- VIII. Finances
- IX. Special Educational Programs

The incidence of problems reported by standard is as indicated in the following table

	I	II	III	IV	V	VI	VII	VIII	IX	Total
#instances problems were indicated....	6	8	17	9	5	6	3	9	17	80 (46 different people)
# of teams involved.....	5	4	9	7	4	4	2	5	7	(15 different teams)

As can be seen, Standards III and IX seemed to present the most problems. Twenty-nine percent of the visitors pointed to one or more problem. To be more specific,

- 30 people indicated problems with one standard.
- 8 people indicated problems with two standards.
- 6 people indicated problems with three standards.
- 2 people indicated problems with nine standards.

It must be remembered that many, if not most, team members only deal with a single functional area in a team visit and therefore perhaps only one problem area. They are reporting, by and large, their difficulty, not the team's difficulty.

The team members made quite a few suggestions. They are summarized below (Incidence in parentheses):

General Comments--

- Standards are "clear," "useful," "good" (35)
- Standards are of limited value at excellent institutions; too rigid, too wasteful at such places (2)
- Don't let standards become a "checklist" (3)

Regarding on-site orientation session--

- Positive:
- helpful and informative (7)
 - useful "getting to know" (1)
 - well organized, thorough (1)
 - helped to focus things (1)

- Negative:
- trainer not well prepared; anecdotes, stories (1)
 - tedious, "read the standards to us like children" (7)
 - too much "hot air", not enough focus on institution (3)
 - not pertinent to tasks; unnecessary (2)
 - too long, too much "walking through" the standards (2)
 - "four hours!", of little use; assumed team members didn't read.....(7)
 - First day a total waste (1)

Regarding the Standards--

- too long; too repetitious, too detailed .. (3)
- matrix problem/larger institutions-- team grouped by standard, then regrouped by unit..(6)
- standards don't list compliance or criterion levels-- judgement/inconsistent guesses?... (9)
- Standard II too general (1)
- Standard II is difficult to use (3)
- Standard II and IV overlap (2)
- Standard III too diffuse--needs useful matrix (6)
- Standard V - view too traditional (4); it is excellent.....(1)
- Standard III - hard to use with public institutions and multicampus situations
- Add intercollegiate athletics (1)

Regarding report writing--

- standards are helpful (30)
- need specific suggestions re report format and organization (15) (chairperson role?)
- too many sub-topics to cover (1)
- "checklist" is not useful (2)

Suggestions

- New team members need a special training session (28)
- On-job-training is the key, with some guidance (4)

Regarding on-site orientation--

- Use examples; use the institution's self-study report (7)
- Need a small team members' handbook (4)
- Chairperson must have good group and communication skills.....(4)
- Train the chairperson better how to do his/her job (10)
- Create a pocket-size version of the standards (1)
- Use case study approach (3)
- Create a report preparation guide (1)

Regarding standards--

- Simplify them; sub-heads are too much (5)
- Too long, too diffuse (4) "Five times too long" (1)
- Show chairperson how to deal with sub-institution units re Standard III and other standards. (matrix problem).....(6)
- Use them flexibly; Don't be rigid; Use judgement (2)
- Focus more on goal achievement (2)

- Standard III too long (4); Use subheads for "general ed" and "basic skills".....(1)
- Standard IX needs criteria for quality (4)

For chairperson--

- send late arrivees home (2)
- give assignments before the visit (4) (re self-study; re areas at institution)

Post-Visit Reactions From Institutions

Each of the institutions visited was asked to respond anonymously to the team experience via a questionnaire (Appendix E). About two-thirds of the 25 institutions responded through their accreditation liaison officer. Not much useful information was obtained in this step. There was some reinforcement of a few of the previously documented aspects and a confirmation that perhaps training for report preparation was needed. The responding institutions were predominantly positive in their reactions to the visit. Some indicated that they were glad WASC was conducting some training efforts.

Other Training Efforts (Fall 1980)

The WASC Senior Commission conducted two additional workshops in the Fall of 1980. In September, 1980 it invited a group of potential evaluators for non-traditional institutions to a two day workshop in Pomona, California (See Appendix F). The workshop was evaluated with the use of a post-workshop questionnaire which received a high response rate (Appendix G)

and which reported very favorable reactions to this workshop. The workshop used presentations, discussions, experts, and one simulation. The respondents asked for more simulation and case work relating to use of the standards in future workshops. The overwhelming reaction of the respondents was positive and laudatory.

In October 1980, the chairpersons who had participated in the September 1979 workshop were invited to attend a second seminar designed to elicit their reflections on the year's experience and to formulate with their assistance suggestions for improving the WASC standards and evaluator training. Thirty-three chairpersons (about 80% of the September 1979 group) attended the seminar (See Appendix H). A very full, lively series of panels, discussions and presentation was experienced. This evaluator presented the data from the evaluation steps completed to that time and workgroups formulated several dozen suggestions for the Commission which were compiled by the staff. The Executive Director of the WASC Senior Commission announced at the end of the seminar that several changes would be implemented in light of the year's experience.

1. that separate training sessions would be instituted for first-time team members;
2. that periodic chairperson seminars would be held as needed;

3. that training materials would be developed as funds and time permitted so that the training workshops could be based in part on case materials, films, simulations and other means which enable "hands on" practice for the participants;
4. that the WASC Commission will attempt to assure that the preliminary visit to an institution made by the team's chairperson will be made at a time which enables a review of the self-study report in draft form.
5. that consideration will be given to the possibility of producing a small handbook for team chairpersons and team members;
6. that the on-site team member orientation sessions will be retained, improved and held on the afternoon of the first day of the visit (a change in terminology);
7. that the WASC accreditation standards will be reviewed during 1980-81 and enhanced where needed in light of the useful suggestions provided by the chairpersons and through the instruments employed in this evaluation project.

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Appendices

- Appendix A -- Schedule of Chairperson's Workshop
September 1979, Pomona, Calif.
- Appendix B -- Evaluation Form for Chairperson Training
Workshop
- Appendix C -- Chairperson Questionnaire for Team Visit
Followup
- Appendix D -- Team Member Questionnaire for Team Visit
Followup
- Appendix E -- Institution Questionnaire for Team Visit
Followup
- Appendix F -- Schedule for Training Workshop for Evalu-
ators of Non-Traditional Programs
- Appendix G -- Post-Workshop Questionnaire for Workshop
for Non-Traditional Program Evaluators
- Appendix H -- Schedule for Second Chairperson Workshop
October 1980

WESTERN ASSOCIATION OF SCHOOLS AND COLLEGES

Accrediting Commission for Senior Colleges and Universities

BOX 9990, MILLS COLLEGE, OAKLAND, CALIFORNIA 94613

(415) 832-5000

WORKSHOP FOR CHAIRPERSONS

September 27-28, 1979

Kellogg-West Center, Pomona

Thursday, September 27

12:00 Arrival and lunch

Call to order: Daniel G. Aldrich, Jr., Vice Chairman, Senior Commission, WASC; Chancellor, University of California, Irvine

Welcome: Hugh O. La Bounty, Jr., President, California State Polytechnic University, Pomona

Remarks from Kay J. Andersen, Executive Director

- Review of program
- Institutions to be evaluated in 1979-80
- Regional and national accrediting issues

1:30 Panel One: Background and development of new standards (10 minutes for each panelist, followed by questions):

- Evolution of standards in this and other regions: Kay J. Andersen
- Perspectives from the Chairman of the Standards Committee: James W. Cleary, President, California State University, Northridge
- Revising and recasting standards in present form: Kathleen Kies, Executive Assistant to the President, California State University, Northridge

2:30 Break

2:45 Review of Handbook format and policies with special reference to those which bear directly on the visit: William B. Iangsdorf, Consultant to the Commission

3:45 Panel Two: Planning for the visit (10 minutes for each panelist, followed by questions):

- Preliminary visit to institutions by the staff and the chairperson to analyze the self-study report and make definite plans for the visit: Otis H. Shao, Associate Executive Director, Senior Commission
- Planning with the team the day before the visit: John E. Cantelon, Provost, Central Michigan University
 - . communicating results of preliminary visit
 - . analysis of self-study report and support documents
 - . establishing major issues and problems
 - . use of Handbook check list

Panel Two (continued)

- Additional activities: William L. Phillips, Secretary of the Faculty, University of Washington

- . adjustments in team assignments
- . instructions for report writing
- . assisting the inexperienced team member
- . joint visit with other agencies

5:00-6:00 Social Hour

6:00-7:00 Dinner. Remarks by a Commissioner: "The Impact of New Standards on Commission Decisions" - Warren B. Martin

Evening Review Standards and formulate questions in preparation for the morning session

Friday, September 28

8:30-10:30 Analysis of Standards. Small groups will rotate every 30 minutes. Discussion leaders will introduce Standards, then invite questions.

<u>Group</u>	<u>Standard</u>	<u>Discussion Leader</u>
1	ONE: PURPOSES	Warren B. Martin, Vice President, The Danforth Foundation
	TWO: GOVERNANCE AND ADMINISTRATION	Sr. Sally Furay, Vice President and Provost, University of San Diego
2	THREE: EDUCATIONAL PROGRAM Standards A - E	E. K. Williams, Director, Johnson Center, University of Redlands
	Standards F - K	James W. Cleary
	NINE: SPECIAL EDUCATIONAL PROGRAMS	Leo F. Cain, President Emeritus, California State University, Dominguez Hills
3	FOUR: FACULTY AND STAFF	Robert K. Thomas, Academic Vice President, Brigham Young University
	FIVE: LIBRARY & OTHER LEARNING RESOURCES	Phyllis I. Bush, Dean, Learning Resources, California State University, Chico
4	SIX: STUDENT SERVICES	Sr. Cecilia Louise Moore, Associate Superintendent, Department of Education, Archdiocese of Los Angeles
	SEVEN: PHYSICAL RESOURCES	E. Howard Brooks, Provost, Claremont University Center
	EIGHT: FINANCIAL RESOURCES	John W. Clark, S.J., Academic Vice President, Loyola Marymount University
10:30	Break	

10:45

- 12:30 Panel Three: Successful techniques for the on-site evaluation (3 minutes each)
- Conducting interviews: Grace E. Larsen, Academic Dean, Holy Names College
 - Conserving time: James W. Cleary
 - Documents to review: Alistair McCrone, President, Humboldt State University
 - Evidence to cite: Otis H. Shao
 - Special problems: John Clark, S.J.
 - Using the Standards worksheet: William B. Langsdorf
 - The open meeting: William B. Langsdorf
 - Exit interview: Joseph Axelrod, Professor of Humanities and Comparative Literature, San Francisco State University
 - Arriving at team recommendations: Leo F. Cain
 - Joint visits: Kay J. Andersen

12:30 Luncheon. Remarks by John S. Toll, President of the University of Maryland: "Observations from the Middle States Accrediting Region"

1:30

2:30 Report writing

The following will be asked to react to the Model Team Report:

Robert K. Thomas

David C. Elliot, Professor of History, California Institute of Technology

J. W. Cassell, President, Pacific Union College

Shirley A. Rush, Dean, College of Liberal Arts, Loyola Marymount University

2:30 General discussion on the best ways to proceed with team training on the morning of the day prior to the scheduled dates for the visit. This session will be conducted by the staff and team chairpersons.

Plans for follow-up next year

3:00 Adjournment

Note: Expenses will be paid by the Commission. It may also be possible to provide a modest honorarium pending receipt of grant money.

With the final program, you will receive the Handbook, Model Team Report, and other materials.

Senior Commission, WASC
CHAIRPERSON TRAINING WORKSHOP
Evaluation/Reaction Form

Appendix B

Please rate the appropriateness or usefulness of each of the following aspects of the Workshop by placing an (x) in one of the columns after each of the items:

Very Appro- priate or Very Useful	Appro- priate or Useful	Somewhat Appro- priate or of Some Use	Not App- pri- or Use
---	----------------------------------	---	----------------------------------

Sessions

Purposes and Goals of the Workshop	()	()	()	()
Size of the Participant Group	()	()	()	()
Content (General) of the Sessions	()	()	()	()
Sequence of the Sessions	()	()	()	()
Types of Instructional/Learning Modes	()	()	()	()
Introductory Session (Goals, sched., inst.'s, issues)	()	()	()	()
Background and Development of new Commission Standards	()	()	()	()
Review of Handbook re Visit	()	()	()	()
Planning for the Visit	()	()	()	()
Dinner Talk: Impact of New Standards on Accred. Devel.	()	()	()	()
Analysis of Standards -- Overall Reaction	()	()	()	()
Subsession 1: Standards One and Two.	()	()	()	()
Subsession 2: Standards Three and Nine	()	()	()	()
Subsession 3: Standards Four and Five	()	()	()	()
Subsession 4: Standards Six, Seven, Eight.	()	()	()	()
Techniques for On-Site Evaluation	()	()	()	()
Report Writing: The Model Team Report	()	()	()	()
Ways to Train the Team	()	()	()	()
Facilities and Arrangements for the Workshop	()	()	()	()

Please offer any explanation, expansion, or comments you care to make on any of the above:

Please list what to you were the two most useful aspects of the Workshop:

1. _____
2. _____

Please list what to you were the two least effective or useful aspects of the Workshop:

1. _____
2. _____

Please indicate the extent to which you feel that the specific goals of the Workshop as presented in the first session were achieved in light of your own experience and attitudes. Check (✓) one.

	Completely	Largely	Only Some- what	Not Very Well
1. To enhance recognition of the need for chairperson and team member training in the light of new standards	()	()	()	()
2. To have the chairpersons achieve a working understanding of the use of the new standards	()	()	()	()
3. To assure that chairpersons feel confident about applying the new standards :				
at traditional institutions	()	()	()	()
at nontraditional institutions	()	()	()	()
4. To enhance chairperson skills needed to conduct evaluation team visits in light of both institutional improvement and standards-oriented aspects of the process	()	()	()	()
5. To enhance chairperson ability to prepare a useful team report in light of the new standards and the need to help institutions improve	()	()	()	()
6. To prepare chairpersons to conduct on-site team member training	()	()	()	()

Please make specific suggestions concerning ways in which we could improve the Workshop: *

1. _____
2. _____
3. _____

Should simulation sessions (live or filmed) be used? Yes ____ No ____

Should practice sessions (e.g., report writing) be used? Yes ____ No ____

Should workshops be held each year? Yes ____ No ____ Comment: _____

Have you attended a previous chairperson workshop? Yes ____ No ____ WASC? ____ Other Region? ____

Number of previous chairpersonships? Check one: 0 - 3 ____ More than 3 ____

Thank you for sharing these thoughts.

(Please return to staff before leaving.)

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Appendix CCHAIRPERSON AND TEAM MEMBER TRAINING PROGRAMPost-Visit Reaction Form

In light of the team visit you recently chaired for the Senior Commission, please rate the appropriateness or usefulness of each of the following aspects of the Workshop training by placing an (x) in one of the columns after each of the items:

	Very Appro- priate or Very Useful	Appro- priate or Useful	Somewhat Appro- priate or of Some Use	Not Appro- priate or Not Useful
Purposes and Goals of the Workshop	()	()	()	()
Nature of the Participant Group	()	()	()	()
Content (General) of the Sessions	()	()	()	()
Types of Instructional/Learning Modes	()	()	()	()
Introductory Session (Goals, sched., inst's, issues)	()	()	()	()
Background and Development of new Comm. Standards	()	()	()	()
Review of Handbook re Visit	()	()	()	()
Planning for the Visit	()	()	()	()
Dinner Talk: Impact of New Standards on Accred. Devl	()	()	()	()
Analysis of Standards — Overall Reaction	()	()	()	()
Subsession 1 - Standards One and Two	()	()	()	()
Subsession 2 - Standards Three and Nine	()	()	()	()
Subsession 3 - Standards Four and Five	()	()	()	()
Subsession 4 - Standards Six, Seven, Eight	()	()	()	()
Techniques for On-Site Evaluation	()	()	()	()
Report Writing: The Model Team Report	()	()	()	()
Ways to Train the Team	()	()	()	()
Facilities and Arrangements for the Workshop	()	()	()	()

Please offer any explanation, expansion, or comments you care to make on any of the above:

Did the workshop prove to have been useful in preparing you to conduct the visit?

Yes () No () Can't say () Please explain: _____

Were there general problems for you and the team in applying the new Senior

Commission Standards? Yes () No () If yes, what were they? _____

Which Standards, if any, proved to be a problem? Please check as many as appropriate:

Standard One () Standard Two () Standard Three ()
Standard Four () Standard Five () Standard Six ()
Standard Seven () Standard Eight () Standard Nine ()

Please describe any specific problem areas encountered in using the Standards:

Please indicate how well the training of team members went?

Very well () Good () Fair () Poor () Please comment:

Are more "hands on" training efforts and simulation exercises needed to train chairpersons? Yes () Perhaps () No ()

To train team members? Yes () Perhaps () No () Comments:

What specific suggestions would you make to improve the ability of chairpersons and team members to use the new WASC standards?

1.

2.

3.

What suggestions would you make to improve the quality of team visits in general?

1. _____

2. _____

Background information:

1. How many previous teams have your chaired? 0 - 3 ()
More than 3 ()
2. Describe the institution you recently visited as chairperson:

Size: 1000 students or less	()	Sponsorship: Private, nonprofit	()
1001 - 5000 students	()	Public	()
5001 - 15,000 students	()	Profit-seeking	()
more than 15,000 students	()		

General curricular style:

generally traditional	()
generally non-traditional	()
a mixture	()

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Appendix D

TEAM MEMBER TRAINING PROGRAM

Post-Visit Reaction Form

1. As a result of the brief training program held at the beginning of the evaluation visit and your reading of the Standards, how would you describe your working knowledge of the Senior Commission Standards?

Check one: Excellent () Good () Fair () Poor ()

Any comment: _____

2. The pre-visit training was:

Very useful () Useful () Not so useful () Not useful at all ()

If it was not useful, what were the major problems? _____

3. As you experienced it, was it difficult to use the new Senior Commission Standards? Yes, very () Yes, somewhat () No ()

Please explain _____

4. Was it particularly difficult to apply any of the particular Standards?

If yes, which one(s)? Standard One () Standard Two ()

Standard Three () Standard Four () Standard Five ()

Standard Six () Standard Seven () Standard Eight ()

Standard Nine ()

5. Was it difficult to use the Standards in the report preparation?

Yes, very () Yes, somewhat () No ()

Explain, please _____

6. What suggestions do you have to improve the quality of team training?

A. _____

B. _____

C. _____

General comments: _____

Background information:

Number of previous accreditation team visits: 0 ()
 1 - 3 ()
 more than 3 ()

Primary assignment at home institution:

Faculty member ()
Administrator ()

THANK YOU VERY MUCH!

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Appendix E

CHAIRPERSON AND TEAM MEMBER TRAINING PROGRAM

Reactions from Institution via Accreditation Liaison Officer

Please share your thoughts with us about the chairperson and team member use of the new Standards. Your response will be anonymous. The number on the envelope is for response and matching purposes only. The evaluator will discard the identification and hold all results, which will be grouped data, until the fall of 1980.

In light of the team activities as you experienced them, please indicate the extent to which you feel that the following specific goals of Senior Commission team training were achieved. Check (✓) one:

	Completely	Largely	Only Some- What	Not Very Well
1. To have the chairpersons achieve a working understanding of the use of the new Standards	()	()	()	()
2. To have the team members achieve a working understanding of the use of the new Standards	()	()	()	()
3. To enhance chairperson skills needed to conduct evaluation team visits in light of both institutional improvement and standards-oriented aspects of the process	()	()	()	()
4. To enhance abilities to prepare a useful team report in light of the new Standards and the need to help institutions improve	()	()	()	()

We would welcome any explanatory comments: _____

Did the team seem to have any trouble using the new standards? Yes ____ No ____

Explain: _____

Were there specific problems concerning particular Standards? If so, which one(s)?

Standard One ()
(Purpose)

Standard Two ()
(Governance)

Standard Three ()
(Educational Program)

Standard Four ()
(Faculty & Staff)

Standard Five ()
(Library, etc.)

Standard Six ()
(Student Services)

Standard Seven ()
(Phys. Resources)

Standard Eight ()
(Finances)

Standard Nine ()
(Special Educational Programs)

Please describe these problem(s):

Were there any problems with the team report: Yes ___ No ___

Explain:

What were the two greatest strengths of the team visit?

1.

2.

What were the two least effective or useful aspects of the team visit?

1.

2.

Suggestions or general comments:

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Appendix F

WORKSHOP FOR EVALUATORS OF NONTRADITIONAL PROGRAMS AND INSTITUTIONS

September 25-26, 1980 (noon to noon)

Kellogg-West Center, California State Polytechnic University, Pomona

Thursday, September 25

10:00 a.m. - 12:00 m. Meeting of program leaders and staff.

12:00 m. - 1:00 p.m. Lunch

1:00 p.m. - 3:15 Information

- A. Review of workshop and introductions
- B. Review of COPA Study of Nontraditional Education - Kay J. Andersen, Executive Director, Senior Commission, WASC (30 minutes)
- C. Review of Accreditation Standards with emphasis on Standard Nine - Ralph Bohm, Dean, Continuing Education, San Jose State University; and Commission staff (1 hour)
- D. Review of Commission policies pertaining to nontraditional education - e.g., Credit for Prior Learning Experience, #21; Graduate Work, #24; Innovative and Nontraditional Programs, #25 - E. K. Williams, Director of Graduate Advising and Lecturer, Whitehead Center, University of Redlands (30 minutes)
- E. Review of Association of Independent California Colleges and Universities report "Off Campus, On Course" - John Thelin, Assistant Director and Research Director, AIOCU (15 minutes)

3:15 p.m. - 3:30 Refreshment Break

3:30 p.m. - 6:30 Practical experiences

- A. Assessing competency-based learning - Georgine Loacker, Chairman, Communications Division, Alverno College (1-1/2 hours)
- B. Assessing prior learning experiences - Urban Whitaker, Professor of International Relations, San Francisco State University (1-1/2 hours)

7:00 p.m. - 8:30 Dinner

Evening: Review of self-study in preparation for simulated visits

MORE . . .

Friday, September 26

8:30 a.m. - 10:00 a.m. Simulation of site visits to nontraditional institutions

1. St. Mary's College - Chairperson, Paul E. Hadley, Vice President for Academic Affairs, University of Southern California
2. Humanistic Psychology Institute - Chairperson, Nathan Shenfeld, Associate Professor of Psychology, Occidental College
3. New College of California - Chairperson, Carolyn Ellner, Associate Dean, Claremont Graduate Schools

Participants will be divided into three teams to simulate site visits to the three institutions. At the conclusion of the visits, the teams will report on the following:

- applicability of existing standards, procedures, and policies;
- recommendations for changes or modifications;
- selection of members of an ad hoc committee to continue the examination of existing accreditation processes and to inter-relate with the ad hoc Committee on Standard Nine

10:00 a.m. - 10:15 Refreshments

10:15 a.m. - 12:00 m. General reporting and discussion by the three groups in plenary session - E. K. Williams, Moderator

12:00 m. Adjournment

Reading Materials:

With this mailing: Senior Commission, Handbook of Accreditation Summary Report on Assessing Nontraditional Education (Recommendations) by Grover Andrews

To be mailed: Sample materials used by CAEL and Alverno College
At workshop: Self-study reports from St. Mary's College, Humanistic Psychology Institute, New College of California
AIOCU Report on "Off Campus, On Course"

Appendix G

WESTERN ASSOCIATION OF SCHOOLS AND COLLEGES

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**EVALUATION OF WORKSHOP FOR EVALUATORS
OF NONTRADITIONAL INSTITUTIONS AND PROGRAMS**

September 25-26, 1980
Kellogg-West Center, Pomona

Please rate the appropriateness or usefulness of each of the following aspects of the Workshop by placing an (x) in one of the columns after each of the items:	Very Appro- priate or Very Useful	Appro- priate or Useful	Somewhat Appro- priate or of Some Use	Not Appro- priate or Not Useful
Review of COPA Study of Nontraditional Education	()	()	()	()
Review of accrediting standards with emphasis on Standard Nine	()	()	()	()
Review of Commission policies pertaining to nontraditional education	()	()	()	()
Review of AIOCU publication	()	()	()	()
Assessing competency-based learning	()	()	()	()
Assessing prior learning experience	()	()	()	()
Simulation of site visits	()	()	()	()

Please offer any explanation, expansion, or comments you care to make on any of the above: _____

Please list what to you were the two most useful aspects of the workshop:

1. _____

2. _____

OVER

Evaluation sheet (2)

Please list what to you were the two least effective or useful aspects of the workshop:

1. _____

2. _____

Please make specific suggestions concerning ways in which we could improve the workshop:

Have you attended previous Senior Commission workshops? Yes ___ No ___

Thank you for sharing these thoughts.

(Please return this sheet to the Commission staff person before leaving.)

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Appendix H

CHAIRPERSON SEMINAR

October 16-17, 1980

San Francisco Airport Sheraton Hotel

Thursday, October 16

9:30 a.m.	Staff meeting at hotel
11:00 - 12:00	Meeting of discussion leaders and staff
12:00	Lunch
1:00 p.m.	Welcome, introductions, and plans for the day - ~~Daniel~~ ^{David L. Cole;} ~~G. Adrich, Jr.~~ Kay J. Andersen
1:30 - 3:00	Analysis of evaluation project - Herbert R. Kells
3:00 - 3:30	Refreshments
3:30 - 5:00	Panel of three experienced evaluators and commissioners who will give case experiences relating to the use of standards. The panel will begin with responses (brief) to Dr. Kells's presentation and then each member of the panel will take about 15 minutes followed by questions - Sally M. Furay, Donald L. Garritty, William L. Phillips
5:30	Cocktail party
6:30	Dinner. Speaker: John E. Cantelon

Friday, October 17

8:30 - 10:30 a.m. Workgroups. Purpose: To improve procedures for 1980-81 visits and make suggestions for Handbook revisions.

Group 1. Improving evaluator training the day prior to the visit. Leader: Paul Albrecht; Reporter: Robert K. Thomas; Staff: Kay J. Andersen

- Review Handbook (pages 69-86)
- Relate standards and procedures to the particular institution
- Expect evaluators to do some homework and to report on particular standards and academic areas in relation to the self-study
- Be careful to concentrate on standards and policies that have particular application to the institution
- Submit basic material (findings, conclusions, recommendations) before leaving. Provide more precise instructions for report format. Use model team report.
- Manage time carefully during visit
- Use effective interview techniques
- Be prepared for the nontraditional institution

Chairperson Seminar - 2 -

Friday, October 17 (continued)

Group 2. Chairperson Responsibilities

Leader: John E. Cantelon; Reporter: Sister Cecilia Louise Moore; Staff: William B. Langsdorf

- Review Handbook, pages 69-86
- Revised check list
- Preliminary visit
- Assisting inexperienced evaluators
- Organization for visit to cover standards and academic areas
- Interviews with president
- Meeting with board
- Open meeting
- Report writing
- Letter to team members

Group 3. Use of Standards

Leader: Allan O. Pfnister; Reporter: Warren B. Martin; Staff: Leo F. Cain

- Continue discussion from Thursday p.m.; staff will record suggested changes in standards
- Standards worksheet
- Problems experienced by the institution in adapting to standards

10:00 - 10:30

Refreshments

10:30 - 12:00

Return to general session. Reporters will each have 30 minutes

Moderator: Richard H. Kosaki

Note: Please observe a no smoking policy in meeting rooms.